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- Leading banker sees big plus in cable bill
- U.S. Nabu Net shuts down amid innuendo, uncertainty
- CTAM sets 1985 convention agenda
- HBO enters home video distribution business

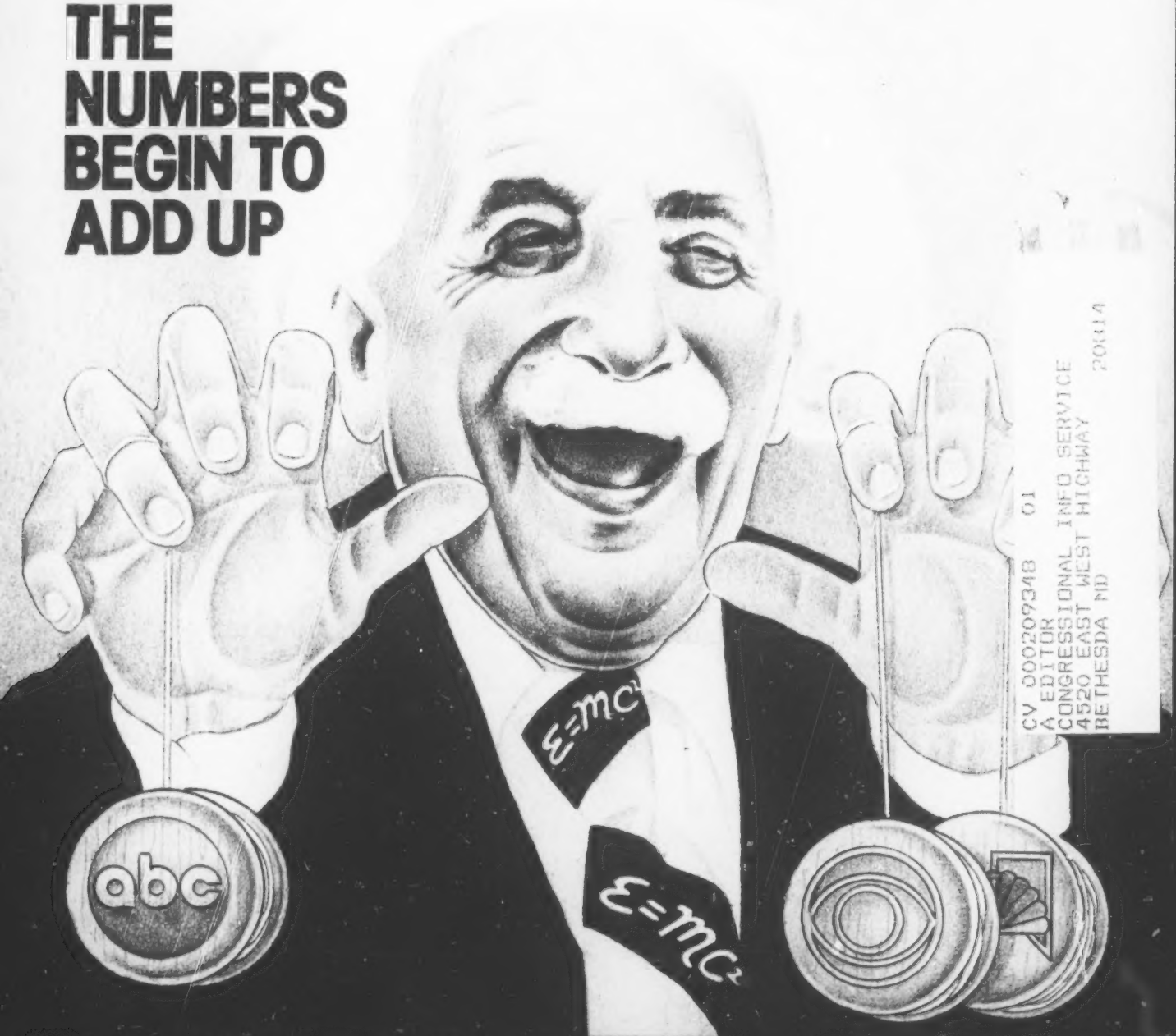
CableVision™

The news and features weekly of the cable television industry

December 3, 1984

Network Erosion:

THE NUMBERS BEGIN TO ADD UP



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BETHESDA MD

Group W's Buena Park, Calif., system will be the site of the launch of Request Teletext, the MSO's one-way text service. See story, page 24.

Leading the week.....9-16

Banker likes it

After studying the impact of the newly enacted cable deregulation bill, Richard MacDonald, assistant vice president for equity research at First Boston Corp., has concluded that the cash flow potential of most cable system operators will expand dramatically and the values of public cable stocks will rise accordingly in the wake of the legislation's enactment.

HBO video distribution

Home Box Office is in the home video distribution business, under a new 50-50 partnership formed with Thorn EMI Screen Entertainment.

Nabu nightmare

The decision by the board of director's of the Nabu Network to withhold the software license to its U.S. investors, thereby closing the U.S. office, took many off-guard and sent rumors flying that its principle investor may have other suitors in mind.

Saving subs

CTAM announces the theme for the 1985 convention, which will be held Aug. 4-7 at the Fairmont Hotel in San Francisco.

D.C. dickering

Capital Cities Cable has filed a $125 million antitrust action charging the city of Washington, D.C., franchise winner District Cablevision and the local phone company, Chesapeake & Potomac, with conspiring to ensure the phone company would have a substantial role to play in bringing cable to the city.

DBS downloading is on

Discovery Broadcasting System, formerly Computer Satellite Network, plans to debut both a cable-delivered basic programming service on high-tech subjects and a personal computer software downloading venture in 1985, officials announced.

Equity efforts

CBS is far from a tentative agreement with Cablevision Systems and The Washington Post Co. involving equity in SportsChannel and/or Rainbow Programming Services, sources close to the situation maintained last week.

Sports at a glance

United Video hits the industry with another alphanumeric channel, Cable SportsTracker.

Two-way meter read

American Cablesystems of Newburyport, Mass., begins an experimental meter-reading project in conjunction with the Rowley Light Department in Rowley, Mass. Meanwhile, Metrovision's cable system in Lincoln, Neb., prepares for Lincoln Electric System's 10-home test which gets under way early next year.

Sections

Programming 26

Rogers Cablevision's new packaging strategies in its San Antonio system are designed to add more subscribers and position them to be receptive to pay-per-view. The new offerings come on the

heels of three rate increases for the system's subscribers. Also, Robert DiMatteo reviews The Learning Channel's series on film and video produced by independent filmmakers.

Marketing/Advertising 28

Cable AdNet, the Pennsylvania-based interconnect and advertising rep firm, opened a shop in San Francisco to make inroads in the Bay area's local and regional cable advertising sales efforts. Also, United Cable Television Corp. will launch its new advertising effort in 24 systems. The campaign will feature the theme, "The more you live, the more United gives."

Business & Finance 43

Among companies recently reporting quarterly earnings, Tele-Communications Inc., Comcast Corp. and Playboy had rising earnings figures. AM Cable lessened its losses, and Wavetek reported red ink. Also, American Cablesystems announced that its Illinois partnership is sold out.

About the cover

Artist Cindy Enright's illustration shows Albert Einstein toying with the three broadcast networks. Associate Editor Louis Chunovic examines the progress cable has made in ratings shares in this week's *PLUS*, beginning on page 30.

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COVER STORY

The decline of network dominance

Genius challenges the establishment

In cable homes the answer is clear: The amount of time spent watching the alternatives is growing at the expense of the big three networks.

By Louis Chunovic

Actors, audiences and others sometimes forget, but television is a business. And like other businesses, it's the bottom line that counts.

There are lies, damn lies and statistics. That's a truism. So it is helpful to remember that decision-makers on Sunset Boulevard, Madison Avenue or Peachtree Street all may be concerned with different, albeit equally valid, bottom lines.

One bottom line is that the three traditional broadcast networks have a significantly smaller slice of the audience pie than they had a decade ago. The ratings of a typical prime-time network series have "eroded" by approximately one-sixth (most estimates range from 12 percent to 18 percent) in that period.

A second bottom line is that the broadcast networks—ABC, CBS and NBC—still have by far the largest single piece of that audience pie.

A third is that the pie itself is much larger than it used to be. Levels of homes using television (HUT) have risen with the increasing population.

And a fourth bottom line is that where there once was but one pie on the table, now there are many. . . and still more to come from new technology's fast-cooking oven.

Program piemen

And while we're on the subject of pies and ovens, let's not forget that the networks and the cable services are not actually the consumers of these tasty audience pies. They are but the bakers. And like proud craftsmen everywhere, these bakers have been arguing about whose pie is tastiest, most nutritious and even whether certain new, smaller pies are better values than the older, bigger ones. But let's hear from some of those most familiar with the ingredients themselves.

The rate of network share decline has slowed, although it hasn't stopped, according to Arnold Becker, vice president, national research, CBS. Approximately a decade ago, the three networks commanded about 93 percent of the prime-time television audience, and that prime-time share has dropped only 13 points to about 80 percent, Becker says.

"CBS' official estimate is that we expect it to bottom out at something around 70 (percent). . . . 1990 is the date that's usually associated with this," Becker notes. "One of the reasons that we are expecting this to level off is that at some point, the new technologies that have been competing essentially solely with the commercial networks begin to compete with each other."

According to a developing broadcast network consensus, that point already has been reached or is about to be reached. "A very substantial part of this gain has been caused just because there are wires, not because there's a cable industry that's been putting on programming," Becker asserts. He estimates that only about half the prime-time network decline could be traced to cable sources, and the rest was caused by newly competitive and prosperous UHF independent stations and others, which in many cases owe their ability to be more aggressive to cable must-carry.

"As to the future, we see a natural 'cap' on the extent to which cable penetration can grow and also natural limits on proliferation, for both physical and economic reasons," was how CBS Television Network President Anthony Malara put it to a gathering of television advertisers early in 1983.

Not all bad

As the rate of cable penetration has slowed, that hypothesis has been echoed by any number of broadcast network officials and others, recently including James Rosenfield, senior executive vice president, CBS/Broadcast Group, who called the networks "a 'born-again' business." In an overview on the CBS/

"The biggest growth area in cable today is the so-called cable-originated networks . . ."

Robert Sieber
Vice President, Research
Turner Broadcasting System

Broadcast Group's most recently adopted strategic plan, he took note of the "resilience of the television network business (which) is a fact. . . we have finally communicated to Wall Street, Madison Avenue and the financial press."

Rosenfield conceded that "the new cable medium has affected the use of network television but in no way has cable replaced the free over-the-air medium."

Quoting historian Daniel Boorstin, Rosenfield declares that "new technologies *transform* the use of old ones; they don't *replace* them." He joined his network colleagues in predicting retention of a combined 70 percent share in 1990.

"If in fact we should end up with something like 70 percent of the prime-time audience, the three networks can still be very profitable," is Becker's observation. "It is not necessary for our business. . . to have 93, 94, 95 percent of the audience (to be viable)."

Becker, Rosenfield and a number of others at the networks have concluded that several side effects of erosion were actually salutary.

After all, goes this line of reasoning, the networks have had continued record profitability; increased competition has made them more conscious of cost containment measures in production and elsewhere; and the experience of cable and other competition has alerted them to even greater future competition and strengthened their argument for repeal of the Financial Interest and Syndication Rule, the 7-7-7 Ownership Rule and other regulations that limit the broadcast networks' ability to compete.

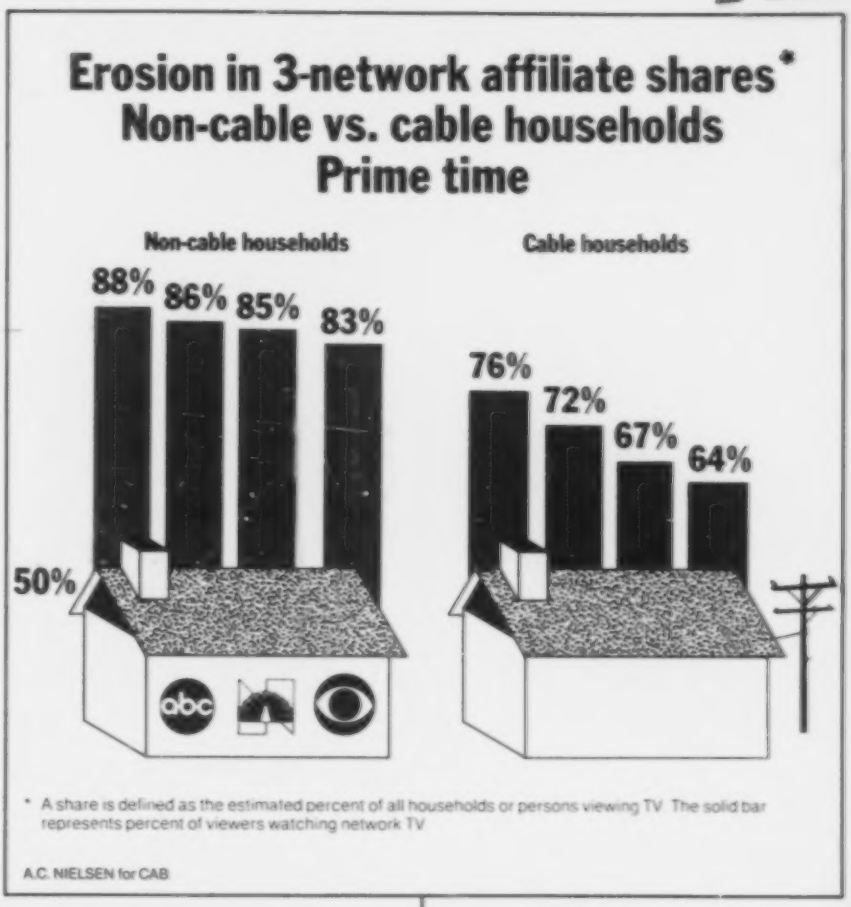
"We're not running scared," says Becker. "We're conscious that our rate of growth will likely not be as great for the television network as in the past. What CBS is thinking, therefore, is 'if you can't beat 'em, join 'em,' so to speak."

That means, as Rosenfield explains the network's strategic plan, that CBS (and by implication the other two networks) "must be prepared to develop new electronic distribution vehicles, including DBS, cable and also pay-per-view. In taking these steps, CBS must be prepared to offer services to home subscribers in various forms including pay services; services partially supported by advertisers, partially by subscribers; and perhaps potentially most lucrative, pay-per-view services to the home."

To most MSO executives and cable operators, those are familiar ingredients indeed. And as the broadcast officials begin to speak the language of cable and the new technologies, their opposite numbers in cabledom are focusing on what was once the frosting solely on broadcast's cake: namely, the all-important numbers that advertisers are seeking.

"The latest Nielsen figures for July of 1984 show that there are 36 million cable subscribers in the country—or roughly 43 percent of all households in the country," Robert Alter, president of the Cabletelevision Advertising Bureau, pointed out to a recent gathering of the National Academy of Television Arts and Sciences. Cable is reaching "upscale demographics: higher income households, larger households, younger, suburban. These attributes are making the base of cable's revenues very solid and are also developing cable as a medium of extreme attractiveness to advertisers."

Despite the highly publicized "slowdown" in cable growth, the CAB is predicting that penetration will cross the 50 percent threshold by the end of 1985 and be at 60 percent by the beginning of the next decade. "In July 1984," says Alter, "people in pay



. . .cable representatives usually concede that entrenched viewing habits, especially among the older demographics, are hard to break, but that different viewing patterns have emerged in the younger audience demographics . . .

The cumulative effect of increasing advertising costs and decreasing numbers of desirable demographics will send advertisers to basic and advertiser-supported cable.

Robert Sieber
Vice President, Research
Turner Broadcasting System

households spent more time with cable programming during the prime-time hours. . . than they did with the three networks."

That level of penetration has made advertisers aware of what Alter called "two television universes. We have a cable universe and we have a non-cable universe. And we're beginning to see vast differences in viewing between those two universes."

The same and different

Alter offered a number of examples of viewing differences between these two universes. For instance, during the first half of 1984, "in non-cable households. . . the network affiliates (had) a 79 share on a 24-hour basis. In cable households, network affiliates (had) a 58 share."

In prime-time, the average broadcast network program commanded a 16.2 rating, according to Alter. That program "has a 5 percent higher rating in non-cable households, a 9 percent lower rating in cable households and a 10 percent lower rating in pay cable households."

For Alter, crucial differences have emerged in the broadcast-network viewing patterns of key audience demographics. To cite one example, the "average prime-time rating among men 18 and older for the three networks is 10.5. It is 7 percent higher in non-cable, 11 percent lower in all cable and 14 percent lower in pay. That is a 21-point spread in terms of average ratings."

According to Alter, an even higher differential exists for teenage viewers (27 points), and there is a 16-point spread for women viewers between those in non-cable and those in pay-cable homes.

Put another way, Alter's contentions are that network erosion is much greater in cabled homes than in non-cable homes and that the cable universe is more demographically desirable to advertisers.

But it isn't only the cable people who are talking demographics. ABC and NBC have long emphasized the *quality* of their audiences as opposed to the *quantity*. Even at perennial ratings leader CBS—once thought of as the older, less urban network—the focus is on those viewers who are most attractive to advertisers.

Referring to *Hill Street Blues*, *Family Ties* and other NBC programs that mostly reach "quality" audiences rather than quantity audiences, Bill Rubens, vice president, research, NBC, says that "at another time, on another network, these programs might not have survived."

Advertisers show "a lot of interest" in qualitative audiences, notes Rubens. "And NBC, while some weeks second in the ratings, (has) been first in key demographics."

Broadcast representatives, of course, usually still focus on how well advertisers understand that the three networks are the only vehicles that reach a truly *national* audience. Therefore, the national-audience franchise is theirs alone, and their demographic emphases have some elements of taking the battle, as it were, to their cable enemy.

"The networks as a delivery system are available to virtually 100 percent of all U.S. television households," declares Rubens. "Cable, over 45 percent; pay cable, I think, is 27 percent. . . . Videocassette recorders, depending on the estimates, 10 percent to 11 percent. (Video) games, much less."

The cabling of nearly one half of the country has given viewers "more choices," Rubens notes, but not all those choices are "useful" for most advertisers. "Let's say that 10 years ago the number of households that could view 10 or more channels was in the low 20s; today it's over 60 percent. Among those homes that can get 26 or more channels, they view in the course of a week about 10 of them."

Breaking old habits

To this argument, cable representatives usually concede that entrenched viewing habits, especially among the older demographics, are hard to break, but that different viewing patterns have emerged in the younger audience demographics, among persons who have been raised in the multiset, multichannel environment. Measuring viewing on a household basis is no longer accurate, according to Alter and others. Instead, as Alter put it, cable is "emerging as a medium of choice not so much for the household, but for the individuals within each household."

Nonetheless, as NBC's Rubens notes, there are two kinds of competition, not one, between broadcast and cable. "One is competition for audience, and one is competition for advertising."

Rubens declares unequivocally that "declining share is not what they (the advertisers) are concerned with. It's what's happening to the audiences. And household audiences have been holding up better than the share."

While this is certainly true, both cable- and broadcast-oriented observers, including NBC's Rubens, recognize that

HUT levels are a function of increasing population and that the postwar baby-boom population explosion is a thing of the past. In other words, an upper limit to HUT level, while not around the corner, is in sight. As Turner Broadcasting Vice President for Research Robert Sieber put it, "The weight of the evidence says that the momentum is behind the cable networks. The cable networks are going to continue to expand in their penetration. The broadcast networks can only expand as fast as the U.S. population."

The general broadcast network feeling is that, while it is the case that there is an upper limit on HUTs (as well as on the number of hours per day that the average viewer can watch—no matter what the program or its source), there also is an upper limit on cable penetration.

In a sense, cable is being "flanked" from the other side by the burgeoning popularity of videocassette recorders, according to NBC's Rubens. But in the competition for sheer audience, the biggest threat to the broadcast networks come from pay cable and especially HBO. "We think to a large degree that the major impact of cable has already been felt," says Rubens. "We expect to see a significant slowdown in the growth of cable and, hence, its impact on the networks. And also for the first time cable is being challenged—by the videocassette recorder. . . . In any event, when (HBO) started, they had a backlog of product available to them. That backlog has been eaten up. They also have competition they didn't have before. So HBO is no longer sitting there high on the hog."

If that's the case, the pay service has company. From 1980 to 1984, "viewing to the network affiliate declined over two hours per week," notes Robert Maxwell, HBO's vice president for research.

"Who's leaving the networks?" Maxwell asks rhetorically. "Clearly it's the most desirable audiences."

According to Maxwell, it is to HBO and the other pay services that the younger, upscale demographics are tuning. Although the pay services don't carry advertising, of course, advertisers need to be aware of where their target audiences are. "The people (who) tend to take us tend to be higher income," Maxwell points out. "If I can 'blue-sky' a bit, the network erosion is taking place among the most desirable audiences; at the same time, the networks are increasingly charging more for this audience. There's got to be a trade-off somewhere down the road, where they're not going to be able to charge that much and continually raise prices, because the audience isn't as good."

According to Maxwell, between 1976 and 1983, the broadcast-network advertisers have seen a 70 percent increase in the cost of a 30-second commercial and an 82 percent increase in their overall cost per thousand.

"One of the things the networks have been saved by is that the HUT levels. . . have always tended to increase," Maxwell says. "I think they're looking at a situation down the road where that is not going to be the case. Somewhere, the lines are going to start to flatten out a bit, because there's only so much time you can take out of the pie, so to speak. Once the ratings don't continue to increase, the networks' share might decrease. . . . If I was an advertiser (I would say), 'Maybe what I'm paying for is not as valuable.' The lines are going to cross somewhere, where they're not going to be able to charge as much for that time, and I think

Total weekly minutes viewed per household (Mon-Sun, 24 hours)

	1st Half 1984		1st Half 1983		Difference (Minutes)	% Change
In Total TV HH	Minutes	Share	Minutes	Share		
Cable Origination	196	6	133	4	+63	+47.4
Superstations	172	6	137	5	+35	+25.5
Pay Service	164	5	146	5	+18	+12.3
Affiliates	2101	69	2134	71	−33	− 1.5
Independents	478	16	479	16	− 1	− 0.2
Public	97	3	100	3	− 3	− 3.0
Total Usage	**3061**		**2995**		**+66**	**+ 2.2**

Minutes do not sum to Total Usage due to Multiset Households.
Source: A.C. Nielsen
Prepared by Cabletelevision Advertising Bureau

Total weekly minutes viewed per household (Mon-Sun, 24 hours)

	2nd Quarter 1984		2nd Quarter 1983		Difference (Minutes)	% Change
In Total TV HH	Minutes	Share	Minutes	Share		
Cable Origination	197	7	136	5	+61	+44.9
Superstations	181	6	136	5	+45	+33.1
Pay Service	169	6	144	5	+25	+17.4
Affiliates	1925	67	1996	70	−71	− 3.6
Independents	448	16	478	17	−30	− 6.3
Public	86	3	91	3	− 5	− 5.5
Total Usage	**2877**		**2856**		**+21**	**+ 0.7**

Minutes do not sum to Total Usage due to Multiset Households.
Source: A.C. Nielsen
Prepared by Cabletelevision Advertising Bureau

Alter's contentions are that network erosion is much greater in cabled homes that in non and that the cable universe is more demographically desirable to advertisers.

it's going to affect the overall quality of programming. And that, in turn, is going to help cable viewing."

The networks are caught in a "double bind," according to Maxwell. They are putting on a greater number of commercials in prime time and charging more for them, thereby risking increasing viewer irritation. Their "event strategy" is costlier than series programming and doesn't build viewer loyalty. In the long term, it only "feeds the erosion."

Better product and ratings

The cumulative effect of increasing advertising costs and decreasing numbers of desirable demographics will send advertisers to basic and advertiser-supported cable, Maxwell predicts. That in turn can only help HBO by negatively affecting the broadcast networks' ability to produce and pay for high-quality programming. The early 1990s will be critical to this scenario, Maxwell concludes.

Naturally, this is a scenario that finds favor at TBS. "The biggest growth area in cable today is the so-called cable-originated networks—that's the name that Nielsen gives them—the ESPNs and the CNNs of the world," says TBS' Sieber.

"Non-broadcast, non-pay networks—the greatest growth is coming in all those networks. Those networks continue to proliferate, they continue to grow in subscribers," he says. "The folks at the broadcast networks will say we're beginning to eat apart our own viewing, that we're fragmenting one another. There is some of that happening, but what is also happening is that the subscriber base keeps getting larger and larger as these systems expand to capacity."

In considering homes delivered by 1990, a 12 million home differential exists between current broadcast-network analysts who forecast a 6 million home gain for the three networks combined and such cable-oriented prognosticators as Sieber, who sees a 6 million home drop by the end of the decade. According to Sieber, one implication of "increasing programming costs versus declining audiences and the possibility that ABC, NBC and CBS (will) have difficulty passing along the costs to subscribers" is that "one of the three broadcast networks will be forced into significant format changes in order to reduce the cost side of the equation." In other words, "programming across all three nets will not look so much alike by the end of the decade (i.e., games/drama in daytime, news/info early morning and entertainment during prime)."

Sieber's forecast seems to find an echo in the recent Rosenfield overview of the CBS strategic plan, in which he said, "We are caught in a vise in which we must control steeply rising costs of programming (and) yet at the same time increase the amount of original programming we schedule to maintain audience."

However, at CBS at least, this vise is being turned into a competitive lever. CBS intends to be "at the forefront" of HDTV, pay-per-view, videocassettes and the other new technologies, specifically including DBS, according to Rosenfield. Additionally, CBS will attack the rising-production-cost problem by increasing in-house production. "The core of our business will continue to be the television network," Rosenfield declares. "Every effort will be made toward strengthening that business, but the key *change* is the (Broadcast) Group's stress on developing our own production capabilities."

Rosenfield stated CBS' (and, by extension, the other two networks') intentions directly: "Not only does the development of our own software relate to meeting some of the cost pressures that we encounter in programming the television network, but most importantly, it gives us the product we can market through the wide range of new pay television channels now emerging at home and abroad."

The broadcast networks intend to countervail against the audience-eroding pressures of cable, VCRs and other nascent video technologies by mastering those technologies themselves and by providing programming—for cable's wires as well as for their own air—that has a more favorable cost/quality ratio.

State-of-the-art technology and good programming—there's no small irony in that prescription. After all, isn't that exactly what the cable services must provide? Consider the industrywide emphasis on cable made-fors and original series and such developments as the planned TBS production-facility expansion in Atlanta.

"We're not going to have the same kind of programming we've always had, particularly at WTBS, as we get the economic viability to improve it," notes Sieber. "That's one of the interesting things that the networks don't take into account. I don't think they see the competition improving the quality of its product."■

Cable services subscriber count

Satellite-fed national service

Basic services	Affiliates	Subscribers	% change in subs from 10/3/83†
American Christian Television Systems (ACTS)	100	1,369,471	NA
Arts & Entertainment	1,500	10,500,000	NA
Black Entertainment Television (BET)	340	7,000,000	+52.0
Cable Music Channel	NA	NA	NA
Cable News Network (CNN)	6,247	27,654,000	+32.7
CNN Headline News	1,780	12,570,000	+169.0
C-SPAN	1,500	18,000,000	+24.1
CBN Cable Network	4,619	24,300,000	+9.4
Country Music Television	225	4,600,000	+283.3
Entertainment & Sports Programming Network (ESPN)	8,438	32,700,000	+35.6
Eternal Word Television Network(EWTN)	165	2,410,000	+48.5
Financial News Network (FNN)	1,000	17,000,000	+88.8
The Learning Channel	530	4,762,840	+32.3
Lifetime	1,992	20,425,569	NA
Modern Satellite Network (MSN)	550	9,913,290	+20.5
Music Television (MTV)	2,470	21,800,000	+45.3
The Nashville Network	2,000	16,800,000	+68.0
National Christian Network (NCN)	95	1,200,000	−16.6
National Jewish Television (NJTV)	196	4,050,500	+43.4
Nickelodeon	3,250	21,100,000	+51.2
Prime of Life	NA	5,000,000	NA
PTL Satellite Network	1,034	10,100,000	+26.2
Santa Fe Communications	26	524,723	NA
Satellite Program Network (SPN)	509	11,664,183	+52.6
Silent Network	240	6,800,000	NA
SIN Television Network*	276	28,338,300	+775.3
Trinity Broadcast Network	370	4,486,000	+39.3
USA Network	4,000	25,000,000	+31.5
The Weather Channel	1,260	12,800,000	+28.0
WGN-TV	5,741	14,211,515	+32.6
WOR-TV	1,066	4,800,018	+17.0
WPIX-TV	152	885,000	NA
WTBS-TV	7,798	31,600,000	+18.5
Pay services			
American Movie Classics	NA	NA	NA
Bravo	156	246,000	+96.8
Cinemax	2,100	2,700,000	+8.0
The Disney Channel	1,712	1,132,389	NA
GalaVision	200	130,000	+4.0
Home Box Office (HBO)	5,400	13,500,000	+8.0
Home Theater Network (HTN)	400	275,000	+22.2
Professional Education Network	NA	NA	NA
The Movie Channel	2,750	3,200,000	+28.0
The Playboy Channel	457	720,000	+44.0
The Pleasure Channel	6	12,000	NA
Showtime	3,000	5,400,000	+20.0
Audio services			
Cable Jazz Network	3	15,120	NA
Lifestyle	104	3,239,773	+79.9
Love Sounds	4	10,730	NA
Moody Bible Institut	34	535,879	+64.5
Nice and Easy	13	111,250	NA
Satellite Jazz Network	13	850,000	NA
Satellite Radio Network	50	403,000	+0.75
SCAN	34	173,000	+60.1
Star Ship Stereo	NA	NA	NA
WFMT, Chicago	154	989,029	+11.3
Text services			
AP News Cable	400	4,700,000	NC
Dow Jones Cable News	175	2,240,000	+38.2
Electronic Program Guide (EPG)	165	3,276,189	+55.8
Genesis Storytime	13	159,000	NA
Reuters News View	350	4,100,000	+17.1
UPI Data Cable	450	NA	NA
Pay-per-view services			
HiLife Channel	NA	NA	NA

Non-satellite-fed national service

Bicycled services			
Fuji Network	7	3,833	+39.8
Nippon Golden Network	5	8,105	+305.0
The Pleasure Channel	8	4,000	NA
Vector Consumer News	12	300,000	NA
Vector Consumer Shopping Guide	16	490,000	NA

Regional entertainment service

Basic service	Affiliates	Subscribers	% change in subs from 10/3/83†
Atlanta Interfaith	7	130,000	+3.1
Bay Area Religious Channel (BARC)	5	107,100	−46.0
Buffalo Sabres Hockey	13	450,000	+38.4
The Ecumenical Channel	5	92,000	NA
Home Sports Entertainment—Houston/Dallas	57	48,000	NA
Home Team Sports	15	20,000	NA
KTVT	NA	NA	NA
Life Newsvision	24	35,000	+218.0
Madison Square Garden	52	1,700,000	+13.0
Meadows Racing Network	19	275,000	NA
MetroChannel	1	112,000	+1.8
New England Sports	NA	NA	NA
Newsday Cable	1	232,000	+22.0
PRISM-Philadelphia	89	369,500	+4.8
Pro-Am Sports	35	25,000	NA
The Superchannel	13	22,000	NA
SportsChannel (New England)	47	55,000	+175.0
SportsChannel (New York)	39	370,000	+23.1
Sports Time	112	42,000	NA
SportsVision	20	45,000	+309.0
Sportsvue Cable Network	25	18,500	NA
Texas Cable Network	12	730,000	NA
Video Music Channel	30	300,000	+172.0
Z-Channel	23	96,730	+5.9

Announced services

Non-satellite-fed services	Expected Launch
The Games Network	4th quarter 1984
Regional services	
Box Seat	TBA
Satellite-fed services	
Alimi Group Network	TBA
The Aloha Network	TBA
AP News Plus	12/84
Apollo Entertainment Television	TBA
The BuenaVision Channel	TBA
Cable Music Channel	10/84
The Cableshop	1/85
Cable SportsTicker	4th quarter 1984
Cabletix	TBA
Comedy Entertainment Network	TBA
Computer Satellite Network	1/85
Discovery Music Network	1/85
Kidvid Network	11/84
MTV Network Second Service	1/85
Magicable	TBA
Movie Time	1/85
Nabu Network	2nd quarter 1985
The Nostalgia Channel	TBA
Pacific Cable	4th quarter 1984
Satellite Concert Network	TBA
Star Video Music	11/84
Studioline	1985
The Work Channel	TBA
X'Press	1st quarter 1985

Note: Subscriber and affiliate counts are as of 7/31/84 unless otherwise indicated.
NA denotes not available.
NC denotes no change.
TBA denotes to be announced.
* Total SIN reach: Spanish-speaking households: 3,490,300.
† Percentage change is now computed using previous year's figures.
Source: Subscriber and affiliate counts are provided by the program service for International Thomson Communications Inc.

National cable advertising

This chart lists national advertisers on the basic cable network during November 1984.

A&E
American Hawaii Cruises (R)
BMW Autos (R)
British Airways (N)
Celestial Seasonings (N)
Exxon (R)
Ford (R)
GM (N)
IBM (R)
Jamaica Tourist Board (N)
Kodak (N)
New World Pictures (N)
RCA (R)
Schwepp's (N)
Showtime (R)
U.S. Postal Service (N)

BET
Anheuser-Busch (R)
AT&T (R)
Avon (R)
Campbell's Soup (R)
Carson Products (R)
Coca-Cola (R)
Eastman Kodak (R)
Ford Motor Co. (R)
Hershey (R)
Home Box Office (R)
IBM (R)
J.C. Penney Co. (R)
Johnson & Johnson (R)
Kraft (R)
Mobil Oil (R)
Nike (R)
Orion Pictures (N)
Pepsi-Cola (R)
Procter & Gamble (R)
Quaker Oats (R)
Sears (R)
Showtime/TMC (R)
Thompson Medical (R)
U.S. Army (R)
U.S. Marines (R)
U.S. Postal Service (R)
U.S. Treasury Dept. (R)
Westinghouse (R)
Wrigley's (R)

CBN†
Borden
Borroughs Welcome
Campbell's
Charles Schwab
Consumer Reports
General Foods
Haines
Jeffrey Martin
J.G. Durand
Kal Kan
Lipton
M&M/Mars
Nabisco
Nestle
Norcliff Thayer
Richardson Vicks
Thompson Medical
USA Today

CMC
Paramount Pictures (R)
Tri-Star Pictures (N)
Wrigley's (N)

C-SPAN**
AT&T (R)
Centel (R)
DuPont (R)
General Motors (N)
IBM (R)
M/A-Com (N)

Dow Jones Cable News*
Charles Schwab & Co.
Consumer Report (N)
House & Garden Magazine (R)
Northwestern Mutual (N)
Smithsonian Magazine (R)

ESPN
AT&T (R)
Canon Cameras (N)
DeBeer's (N)
Dr. Scholl (N)
Esquire (R)
Guest Quarters (N)
HBO (R)
Hitachi (R)
Kawasaki (R)
Leaf Confectionary (N)
Menley & James (N)
Nautilus Sports/Medical Industries Inc. (N)
New World Pictures (N)
Nikon (R)
Nissan (R)
Orion Pictures (N)
Paine Weber (R)
Paramount Pictures (N)
Polaroid (N)
Sports Illustrated (R)
Subaru (R)

FNN
American Airlines (R)
American National/Cellular Telephone (N)
Avis (R)
Barron's (R)
Business Week (R)
Capital Preservation (R)
Charles Schwab (R)
Chicago Board of Trade (N)
Compaq Computers (N)
DHL Courier (R)
Epic/Real Estate (N)
Federal Stamp Reserve (R)
Ford/Autos (R)
Ford/Corporate (R)
GMAC (R)
Heinold Commodities (N)
Hewlett Packard (N)
Hyatt Hotels (N)
Investment Rarities (N)
Italcable (R)
Kansas City Board of Trade (N)
Merrill Lynch (R)
Mita Copiers (N)
National Business Employment Weekly (R)
National Car Rental (N)
National Cash Register (N)
Oldsmobile (R)
Olympic Gold Coins (R)
Ramada Inns (R)
Rarities Mint (N)
Sanyo (N)
Sears Financial Network (R)
Security Pacific (R)
Shearson/Lehman American Express (R)
Transamerica (N)
US Committee for Energy Awareness (N)
Wall Street Journal (R)

MSN
Anheuser-Busch (R)
Archway Cookies Inc. (R)
Ciba Pharmaceutical (R)
CONOCO, Inc. (R)
E.I. DuPont DeNemours & Co. (R)
General Mills (R)
General Foods (R)
Hershey Foods (R)
Mattel Inc. (R)
Mercedes Benz of North America (R)
Midcon Corp. (R)
NASA (R)
Park Row Publishers (R)
Phillip Morris Inc. (R)
Upjohn Inc. (R)
U.S. Army Corp. of Engineering (R)
U.S. Dept. of Transportation (R)
U.S. Olympic Committee (R)
Wrangler (R)

SPN
Air New Zealand (R)
Australian Tourist Bureau (N)
Chesebrough Ponds (R)
China Beer (N)
Hilton Inns (R)
Mennen (R)
Nikon (R)
Pacific Airlines (N)
Purina (N)
Rubbermaid (R)
Time/Life Books (R)
United Airlines (N)

The Learning Channel*
Barron's Report (R)
Charles Schwab (R)
Scientific-Atlanta Magazine (R)
Sports Illustrated (R)
Wall Street Journal (R)

The Silent Network
Campbell's Soup (N)
Hallmark Cards (R)
Lloyd's Hearing Aids (R)
Magnafitch (R)
Solarts (R)

Weather Channel
Allstate (R)
American Home Products (R)
American Motors Corp. (R)
Anco Wiper Blades (R)
Champion Spark Plugs (R)
Intalcable (R)
Norelco (R)
Pillsbury (R)
Procter & Gamble (R)
Prudential-Bache (R)
Quaker Oats Co. (R)
Ralston Purina (R)
Ramada Inns (R)
Sears Portrait (R)
Thomas J. Lipton (R)
3M (R)
United Carbide (R)
United (R)
United Technologies/Carrier (R)
Warner Lambert (R)

R denotes renewal client
N denotes new client
*Listing is comprised of October advertisers
**Listing is comprised of both advertisers and program underwriters
†New and renewal information not available
Source: Advertising clients are provided by the programs services to International Thomson Communications Inc.